

Cal-E-Force

External Stakeholder - Prototype Sessions

Sessions:

1. May 16, 2019 - 1:30 PM – 3:30 PM
2. May 17, 2019 - 10:00 AM – 12:00 PM
3. May 20, 2019 – 1:00 PM – 3:00 PM



Welcome

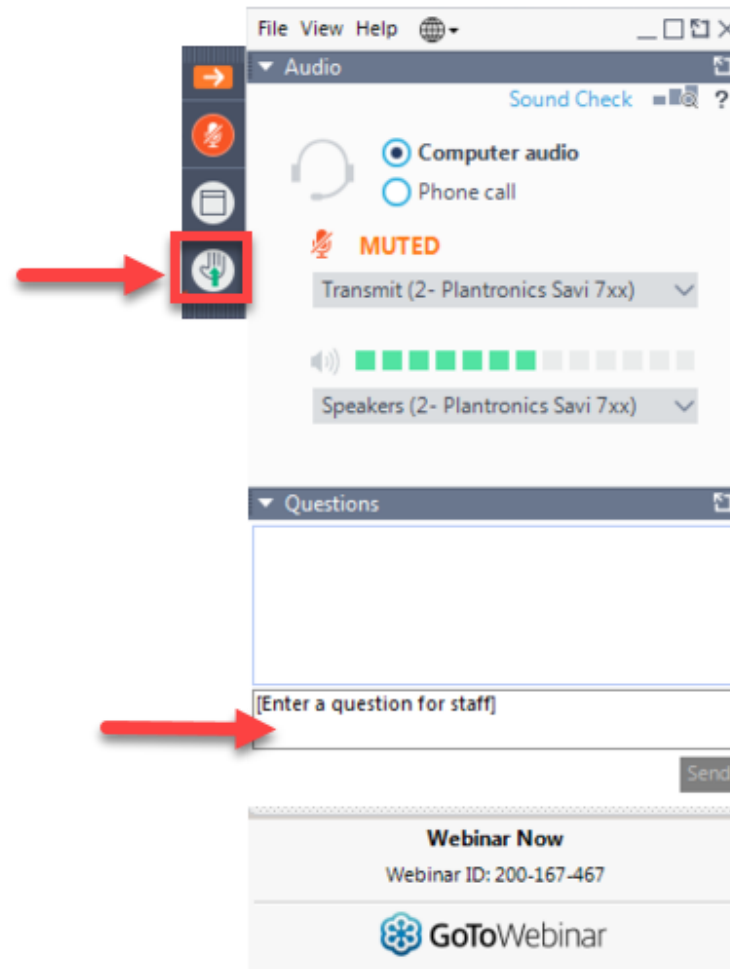
- ❑ Welcome to the External Stakeholder Prototype Sessions for ETMS Contracts to be Migrated
 - Session Narrator: Kristin Centanni from Guidehouse
 - Note taker: Kelsey Oehrke from ETP
 - Executive Representatives: Jill McAloon and/or Michael Cable
 - Facilitator: Babette Davis
- ❑ Format
 - Allow 2 hours
 - 5 minute video tour
 - Presentation and discussion of prototype screen and data to be collected
 - Webinar with muted mic – use the “raise a hand” function



Meeting Structure

The prototype sessions will use GoToWebinar – instructions for access were e-mailed when you registered

- ☐ Designated Q&A throughout presentation
- ☐ “Raise a hand” through GoToWebinar
- ☐ Ask a question through GoToWebinar



Session Goals

- ❑ Capture the ETMS migrated contract support needs
- ❑ Address your inputs/needs/requests, with resolutions being:
 - In Cal-E-Force
 - Not part of ETMS Migration solution – Future considerations
 - ETP Policy related and referred to management
- ❑ The first phase of the project (and the only phase being addressed) is the migration of ETMS contracts
 - This will be done in June 2019
 - Need current ETMS data out of ETMS and in Cal-E-Force
- ❑ Mirroring the legacy business process where possible



Why Salesforce & Cal-E-Force

The benefits of the Salesforce technology

salesforce

- ✓ Is scalable and provides full cloud-computing capability
- ✓ Supports fully customized applications
- ✓ Provides necessary features required of a State of California IT System
- ✓ Has built in infrastructure for security, hardware and connectivity

- ❑ Salesforce provides a flexible platform for us to move ETMS contract data to in a short timeframe
- ❑ Cal-E-Force will be delivered over time based on external stakeholder and internal staff needs



Key Functions for ETMS Contracts

Pre-Application and Eligibility

Application Development

Panel Proposal and Contract

- ☐ To be designed or developed
- ☐ Not part of the current efforts to Migrate ETMS contracts

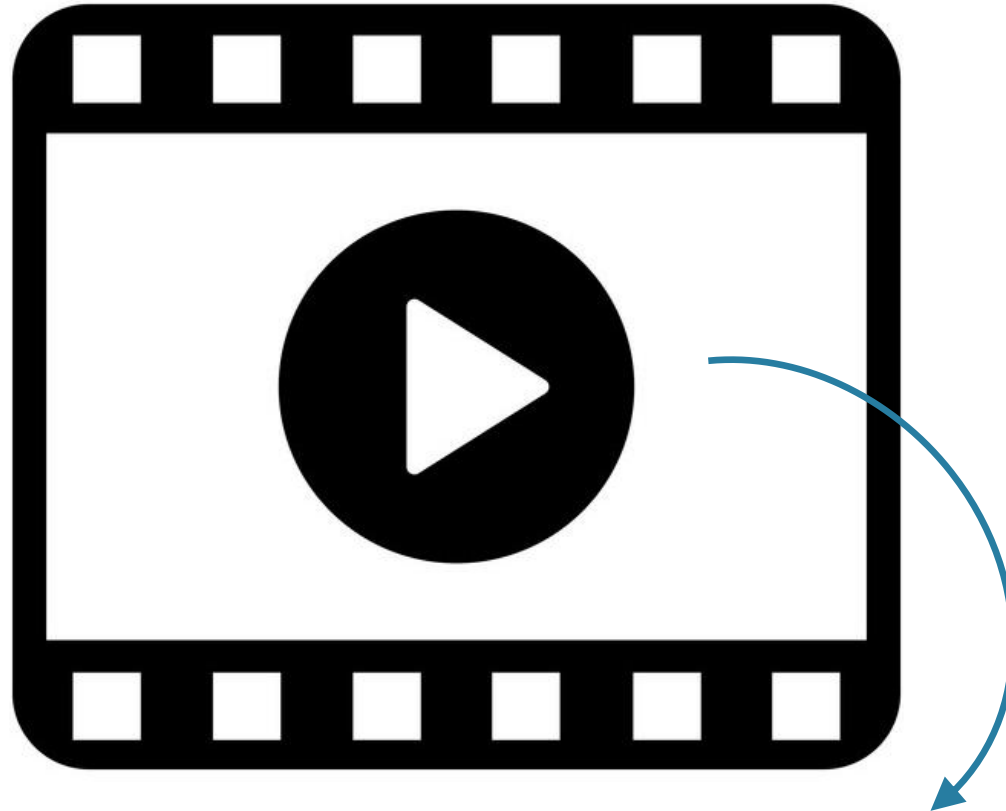
Contract Management

Financial Execution and Close Out

- ☐ Focus is on contract execution
- ☐ Ability to continue managing ETMS contracts. Processes are:
 - ✓ Enrollments
 - ✓ Hours Tracking
 - ✓ Invoicing
 - ✓ Revisions
- ☐ Modifications in this area can be made prior to full launch



Live Walkthrough



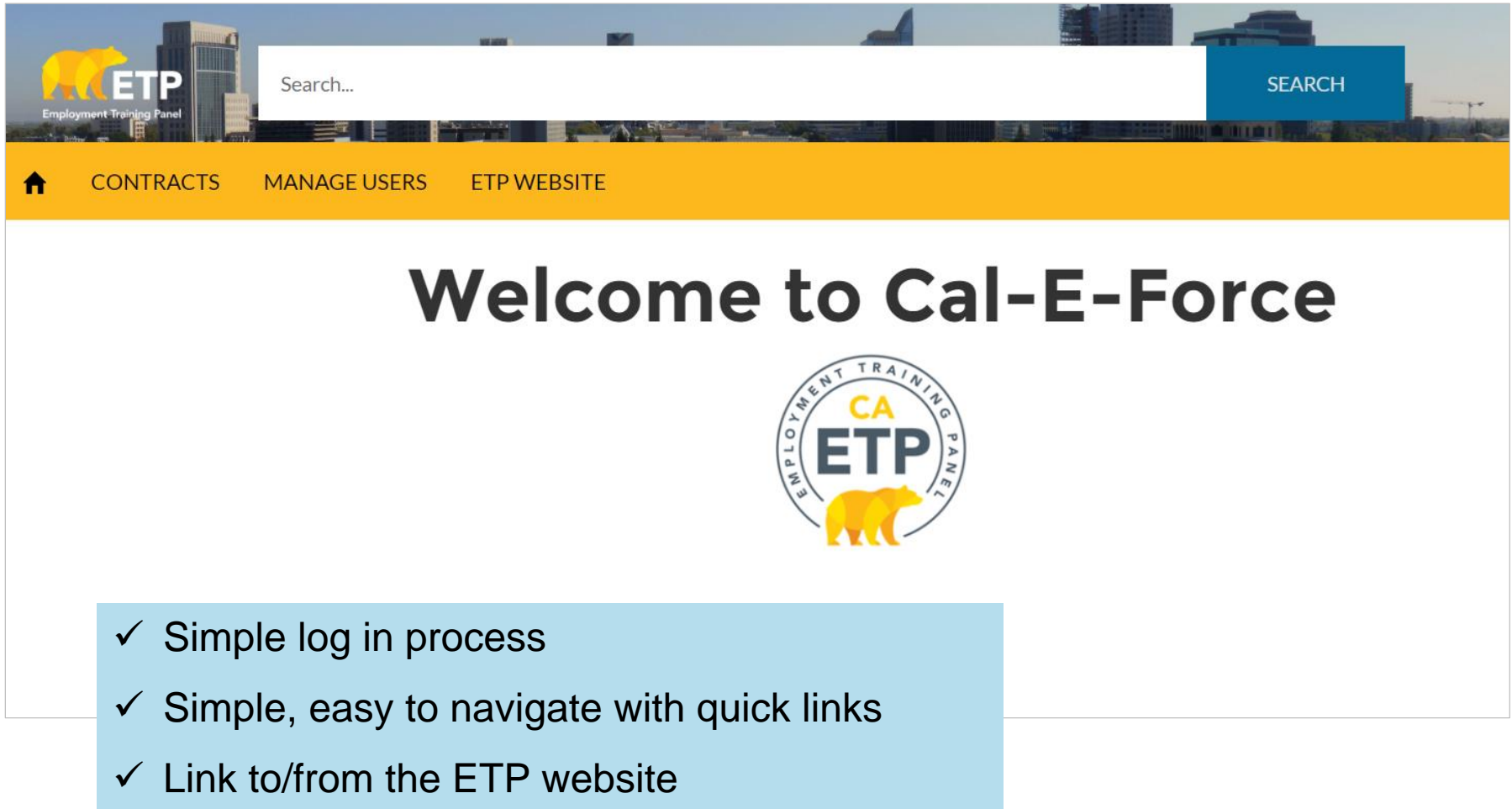
Link to video walkthrough – [CLICK HERE](#)

Functions to Review

1. Landing Page
2. Contract Management
3. Enrollments
4. Hours Tracking
5. Revisions
6. Invoicing



Landing Page (1 of 2)



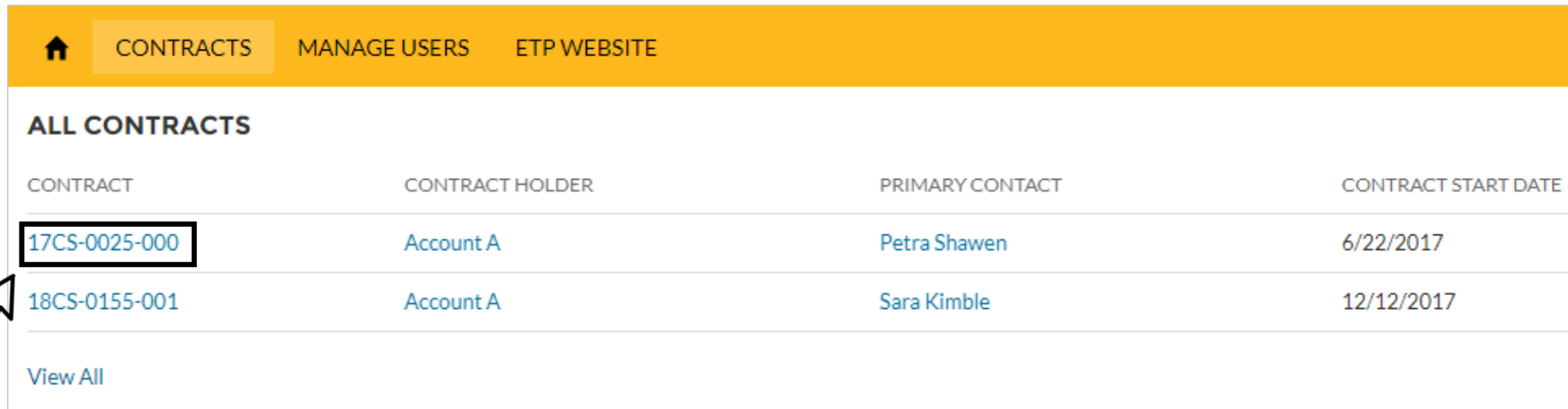
Landing Page (2 of 2)



- ❑ Entry point to all aspects of Cal-E-Force
- ❑ Access all parts of Cal-E-Force and migrated ETMS contracts

Contract Management (1 of 5)

- ✓ Contract summary and detailed information
- ✓ Contract status information



| CONTRACT | CONTRACT HOLDER | PRIMARY CONTACT | CONTRACT START DATE |
|---------------|-----------------|-----------------|---------------------|
| 17CS-0025-000 | Account A | Petra Shawen | 6/22/2017 |
| 18CS-0155-001 | Account A | Sara Kimble | 12/12/2017 |


[View All](#)

- ❑ All contract information in **one place**, including: contract value, financial information, locations, trainees, job numbers, revisions and invoices



Contract Management (2 of 5)

[🏠](#) [CONTRACTS](#) [MANAGE USERS](#) [ETP WEBSITE](#)

 Contract
18CS-0155-002

| | | | |
|----------------------|--------|---------------------|-------------------|
| Contract Holder | Status | Contract Start Date | Contract End Date |
| BCCI | Draft | 4/30/2019 | 4/29/2022 |

Button Bar [ENROLL TRAINEES](#) [UPLOAD TRAINEES](#) [ADD HOURS](#) [UPLOAD HOURS](#) [CREATE INVOICE](#) [REQUEST REVISION](#)

The “button bar” is at the top of the Contracts Detail page and your gateway to managing Enrollments, Hours Tracking and Invoicing.



Contract Management (3 of 5)

The Contract Details Page contains:

1. Contract Information
2. Contract Value
3. Financial Information

Continued...

| | |
|---|---|
| Contract Information | |
| Contract Number 18CS-0155-001 | Contract Start Date 12/12/2017 |
| Contract Holder Account A | Contract End Date 12/11/2019 |
| Contract Holder Type Single Employer Contract (SE) | Hold <input type="checkbox"/> |
| Status Contract Complete | Credit Only <input type="checkbox"/> |
| Contract Value | |
| Total Contract Amount \$729,100.00 | Estimated Number of Trainees 350 |
| Training Cost \$100,000.00 | In Kind Contribution \$46,076.00 |
| Financial Information | |
| Total Invoice Amount \$5,372.20 | 75% of Contract Value \$546,825.00 |
| Total Payments \$0.00 | Progress Payments Available Until 75% \$546,825.00 |
| Total Earned Amount (\$735.42) | Performance % -0.10% |



Contract Management (4 of 5)

The Contract Details
Page...*continued*:

4. Entities & Locations
5. Trainees
6. Job Numbers

| Entities and Locations (4) | | |
|-----------------------------------|------------------------------|----------------------|
| WORKPLACE | ACCOUNT | NUMBER OF TRAINEES |
| 1. New York Office (Headquarters) | Account A | 4 |
| 2. San Diego Office | Account A | 23 |
| Trainees (6+) | | |
| NAME | TRAINEE STATUS | EXTERNAL ID |
| Smith, Brian | Enrolled | 18CS-0155-001-2-1234 |
| Santana, Tracy | Enrolled | 00000160-2-1235 |
| Doe, John | Enrolled | 00000160-2-1236 |
| Job Numbers (3) | | |
| JOB NUMBER DESCRIPTION | ESTIMATED NUMBER OF TRAINEES | WEIGHTED AVERAGE HOL |
| 5. Retrainees | 100 | 200.00 |
| 6. Retrainee Veterans | 200 | 50.00 |
| 7. Job Creation | 50 | 25.00 |



Contract Management (5 of 5)

The Contract Details
Page...*continued*:

- 7. Contract Revisions
- 8. Invoices

Contract Revisions (2)

| CONTRACT REVISION NAME | REVISION TYPE | REASON | REQUEST DATE |
|-------------------------|---------------|--------|--------------|
| CR-0042 | Technical | V.1 | |
| CR-0043 | | V2.1 | |
| | | | |

Invoices (1)

| INVOICE NUMBER | TYPE | STATUS | AMOUNT |
|-----------------------------|----------|--------|----------|
| INV-0000368 | Progress | Draft | \$166.86 |

Enrollments (1 of 3)

The screenshot displays the ETP website interface. At the top is a navigation bar with links: Home (house icon), CONTRACTS, MANAGE USERS, and ETP WEBSITE. Below this, a contract card for 'Contract 18CS-0155-002' is shown with a green document icon. The card contains a table with contract details:

| Contract Holder | Status | Contract Start Date | Contract End Date |
|-----------------|--------|---------------------|-------------------|
| BCCI | Draft | 4/30/2019 | 4/29/2022 |

Below the table is a row of action buttons: ENROLL TRAINEES, UPLOAD TRAINEES, ADD HOURS, UPLOAD HOURS, CREATE INVOICE, and REQUEST REVISION. The 'ENROLL TRAINEES' and 'UPLOAD TRAINEES' buttons are highlighted with orange boxes. A mouse cursor icon points to 'ENROLL TRAINEES' with the label 'Manual' below it, and another mouse cursor icon points to 'UPLOAD TRAINEES' with the label 'CSV Upload' below it.

- ✓ Ability to enroll manually
- ✓ Ability to enroll using CSV

Enrollments (2 of 3) - Manual

- ✓ Reduced amount of data required to enroll
E.g. Not associating enrollees to occupations

The screenshot displays a web form for manual enrollment, divided into two main sections: 'Information' and 'Demographic Data'.

Information Section:


- SSN ¹: * [Redacted]
- Employee ID ¹: [Redacted]
- Trainee First Name: * [Redacted]
- Trainee Last Name: * [Redacted]
- Trainee Middle Name: [Redacted]
- Hire Date: * [Redacted] [5/15/2019]
- Trainee Status: * [Enrolled ▼]
- Job Number: [None- ▼]
- Workplace: [None- ▼]
- Auto Generated ID: ☐

Demographic Data Section:

- Gender: * [--None-- ▼]
- Age Group: * [--None-- ▼]
- Education: * [--None-- ▼]
- Veteran: * [No ▼]
- Disabled Veteran: [No ▼]
- Ethnicity: * [Available ▼]
 - White
 - African American/Black
 - Ethnic Hispanic or Latino

A blue curved arrow originates from the text 'Not associating enrollees to occupations' and points to the 'Demographic Data' section, specifically highlighting the 'Ethnicity' dropdown menu.

Enrollments (3 of 3) - Uploads

 **Messages**
The records saved successfully are: The record Number is: 1
The records saved successfully are: The record Number is: 2

Please Upload your CSV file here: No file chosen

Note: Please use the standard template to upload Trainees data. [Click Here](#) to download the template

| TRAINEE FIRST NAME | TRAINEE LAST NAME | JOB NUMBER | WORKPLACE | TRAINEE STATUS | GENDER | AGE GROUP | VETERAN | ETHNICITY | DISABLE |
|--------------------|-------------------|------------|-------------------------|----------------|--------|-----------|--------------------------|-----------|---------|
| Kelsey | Test | Group 2 | General Dynamics NASSCO | Enrolled | Female | 25-34 | | White | No |
| Eley | Testy | Group 2 | NASSCO MV | Placed | Male | 25-34 | <input type="checkbox"/> | White | No |


When you are satisfied with the data map above, click the Upload Trainee data button to insert the Trainee records.

- ✓ Partial upload success and error management
- ✓ Still under development

Hours Tracking (1 of 3)

- ✓ Ability to add hours manually
- ✓ Ability to upload hours using CSV

[🏠](#) [CONTRACTS](#) [MANAGE USERS](#) [ETP WEBSITE](#)

 Contract
18CS-0155-002

| | | | |
|----------------------|--------|---------------------|-------------------|
| Contract Holder | Status | Contract Start Date | Contract End Date |
| BCCI | Draft | 4/30/2019 | 4/29/2022 |

[ENROLL TRAINEES](#) [UPLOAD TRAINEES](#) [ADD HOURS](#) [UPLOAD HOURS](#) [CREATE INVOICE](#) [REQUEST REVISION](#)

Manual

CSV Upload



Hours Tracking (2 of 3) – Manual

- ✓ Reduced amount of data required to track hours
- ✓ Roster #s available but not mandatory
- ✓ Simplified from ETMS
 - Removal of class titles (except for CBT hours)
 - Simplified curriculum structure
- ✓ Retrievable data pertaining to hours tracking

The screenshot displays the ETP (Employment Training Partnership) interface. At the top, there's a search bar and navigation links for CONTRACTS, MANAGE USERS, and ETP WEBSITE. Below this is a table titled 'Trainees' with columns: FIRST NAME, LAST NAME, JOB NUMBER, SSN, TRAINEE STATUS, TOTAL VALID HOURS, WORKPLACE, and EMPLOYEE ID. A blue arrow points from the 'TOTAL VALID HOURS' column to a 'Hours Data' form overlay. The form includes fields for Delivery Method, Training Type, Roster Number, Date, and Total Hours, each with a red asterisk indicating it's required. A 'Submit' button is at the bottom. A dropdown menu for 'Training Type' is open, showing options: --None--, Business Skills, Commercial Skills, Green/Clean Skills, Hazardous Materials Skills, Management Skills, Manufacturing Skills, Literacy Skills, and Job Readiness Skills.

| FIRST NAME | LAST NAME | JOB NUMBER | SSN | TRAINEE STATUS | TOTAL VALID HOURS | WORKPLACE | EMPLOYEE ID |
|------------|------------|------------|-----|----------------|-------------------|------------|-------------|
| Joe | Root | 3 | | Enrolled | 0.0 | Sacramento | 569820 |
| Jonny | Bairstow | 3 | | Enrolled | 0.0 | Sacramento | 569821 |
| Jos | Buttler | 3 | | Enrolled | 8.0 | Sacramento | 569822 |
| Josh | Hazlewood | 1 | | Enrolled | 0.0 | San Jose | 901235 |
| Kane | Williamson | 2 | | Enrolled | 2.0 | Portland | 569810 |
| Lisa | Stalekar | 2 | | Enrolled | 0.0 | Portland | 303832 |
| Martin | Guptill | 2 | | Enrolled | 3.0 | Portland | 569811 |
| Meg | Lannine | 3 | | Enrolled | 0.0 | Sacramento | 830212 |
| Megan | | | | | | | |
| Mitchell | | | | | | | |

Hours Data

Delivery Method * --None--

Training Type * --None--

Roster Number

Date *

Total Hours *


Submit

Training Type *

- None--
- Business Skills
- Commercial Skills
- Green/Clean Skills
- Hazardous Materials Skills
- Management Skills
- Manufacturing Skills
- Literacy Skills
- Job Readiness Skills



Hours Tracking (3 of 3) - Upload

 **Errors**

There are errors while saving these records: The record Number is: 1 :The error is: Trainee_Date_Roster_ID__c not specified
There are errors while saving these records: The record Number is: 2 :The error is: Trainee_Date_Roster_ID__c not specified

Please Upload your CSV file here: No file chosen

Note: Please use the standard template to upload Hours data. [Click Here](#) to download the template

| TRAINEE | ROSTER NUMBER | DATE | NUMBER OF HOURS | DELIVERY METHOD | TRAINING TYPE |
|---------|---------------|-----------|-----------------|--------------------------------|-------------------|
| | 456 | 5/15/2019 | 8.0 | Classroom/Simulated Laboratory | Commercial Skills |
| | 456 | 5/15/2019 | 4.0 | Classroom/Simulated Laboratory | Computer Skills |
| | 456 | 5/15/2019 | 5.0 | Classroom/Simulated Laboratory | Computer Skills |
| | | 5/14/2019 | 2.0 | Classroom/Simulated Laboratory | Commercial Skills |
| | | 5/14/2019 | 8.0 | Classroom/Simulated Laboratory | Computer Skills |

When you are satisfied with the data map above, click the Upload Hours data data button to insert the Hour records.

- ✓ Partial upload success and error management
- ✓ With roster numbers optional, you will lose mass edit capabilities and duplicate detection
- ✓ Still under development

Invoicing (1 of 2)

The screenshot displays the ETP system interface. At the top, a navigation bar contains the following links: ENROLL TRAINEES, UPLOAD TRAINEES, ADD HOURS, UPLOAD HOURS, CREATE INVOICE, and REQUEST REVISION. A blue circle with the number '1' is positioned above the navigation bar. A mouse cursor is pointing at the 'CREATE INVOICE' button, which is highlighted with a black border. Below the navigation bar, a section titled 'Contract Information' is visible, showing the 'Contract Number' as '18CS-0155-002'. A blue circle with the number '2' is positioned above this section. Below the contract information, a yellow navigation bar contains the following links: HOME, CONTRACTS, MANAGE USERS, and ETP WEBSITE. Below the yellow bar, a form titled 'Choose Invoice Type' is displayed. The form contains three radio button options: 'Progress', 'Final', and 'Close - Out'. A 'Next' button is located to the right of the radio buttons.

✓ Screen to enter invoice requests



Invoicing (2 of 2)

3

Invoice Progress Temp

Search by Name

Previous

Back to Contract

Save

Next

| FIRST NAME | LAST NAME | EMPLOYEE ID | SOCIAL SECURITY NO | JOB NUMBER | <input type="checkbox"/> P1 | <input type="checkbox"/> P2 | DROP |
|------------|---------------|-------------|--------------------|------------|-------------------------------------|-------------------------------------|--------------------------|
| Jonny | Bairstow | 569821 | | 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Jos | Buttler | 569822 | | | | | |
| Colin | De Grandhomme | 569815 | | | | | |
| Aaron | Finch | 569801 | | | | | |
| Glen | Maxwell | 569800 | | | | | |
| Anna | Petersen | 569818 | | | | | |
| Andrew | Tye | 569804 | | | | | |
| Elyse | Villani | 569808 | | | | | |

4

BCCI - INV-0000368

Invoice Date
2019-05-02

Contract Number
00000163

Total Amount Requested
\$279.06

Adjusted Total Amount Requested
\$279.06

| PAYMENT TYPE | JOB NUMBER | NUMBER OF TRAINEES | TOTAL |
|--------------|------------|--------------------|------------|
| P1 | 1 | 1 | \$695.00 |
| P2 | 1 | 1 | (\$528.14) |
| P1 | 3 | 2 | \$373.50 |
| P2 | 3 | 2 | (\$261.30) |

Invoice Notes

Adjustments Applied

Adjustment Balance Remaining
\$0.00

Submit

- ✓ Ability to filter and sort
- ✓ Greater transparency around invoice adjustments
- ✓ Editable default values on final invoice



Request a Revision

1

TRAINEES ADD HOURS UPLOAD HOURS CREATE INVOICE REQUEST REVISION

2

Request to Revise the Agreement(check all that may apply)

- ✓ Simple way to submit revision requests
- ✓ Ability to check the status of revision requests
- ✓ All revision details on one page

Contractor Name Change To

* Revision Term Start Date

* Revision Term End Date

☐ Delivery Methods / Training Types

☐ Curriculum Changes

☐ Revise Trainee Wages

☐ Revise Trainee Hours / Range of Hours

☐ Revise Job Titles

☐ Add New Job Number(s)

☐ No. to Train or Funding Btwn. Job No.'s

☐ Other

☐ Revise Standard Contract Language

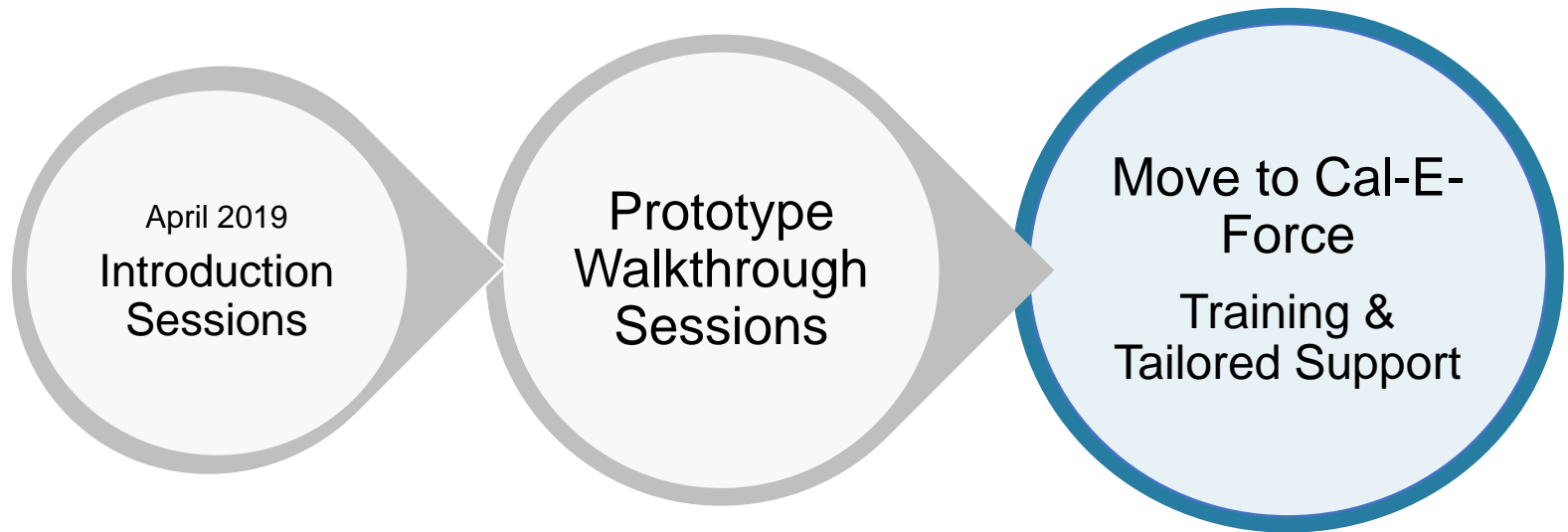
* Reason

CANCEL

SUBMIT



Next Steps



- 3 working sessions completed
- 3 prototype sessions
- Upload/download walkthroughs to be in the next two weeks
- Email confirmation of assigned support staff
- Training to be scheduled
- Other modifications if needed

Keep an eye out for training communications!



Thank You!

Executive-Level Contact

Jill McAloon, Chief Deputy Director will address concerns



Jill.McAloon@etp.ca.gov

Ideas or Comments



ETPCalEForce@etp.ca.gov

